



EXHIBIT 1
DATE 1.19.07
HB 270

Market Research Insight

Montana Chamber of Commerce

MONTANA P-BASE SURVEY

JANUARY 2007

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January 2007

Introduction & Methodology

This report represents the results of a scientific survey of public opinion among 600 Montana voters conducted in December of 2006.

The sample population was scientifically selected to meet rigid criteria of random selection and geographical allocation. Survey results for the sample of 600 Montana voters provides a sampling error factor of plus or minus 4.1% at the .95 level of confidence; however, error factors for various geographical areas and crosstabulations contained in this report may vary widely depending upon the number of respondents in each cell.

Market Research Insight follows established and accepted procedures for sample selection, survey design, and analysis. All survey research, however, is subject to a margin of statistical error.

Executive Summary

Market Research Insight completed a statewide survey of 600 voters in December of 2006 for the Montana Chamber. The survey provides a statistical error factor of 4.1% at a .95 level of confidence. Prior to the current statewide voter sampling completed in December of 2006, MRI completed earlier surveys in 2005, 2003, 2001, 1999, 1995, and 1992. Tables in this report show data for questions used in the current survey which were also contained in Montana surveys for 2005, 2003, 2001 and 1999.

Analysis

Dr. Verne Kennedy, President and Senior Analyst for Market Research Insight, served as Project Director, examined data and prepared the following analysis report. The analytical report is based upon the actual interviews of 600 Montana voters conducted from the field research facilities of Market Research Insight. Results contained within this report are based upon responses as reflected in the survey at the time actual interviews were completed.

Question 1 asked: "In which Montana County do you live?"

NIELSEN DESIGNATED MARKET AREAS				
	2006	2005	2003	2001
Missoula, MT	27%	27%	29%	29%
Billings, MT	23	22	23	23
Great Falls, MT	19	19	17	17
Butte-Bozeman, MT	17	16	17	16
Minot, ND	3	4	3	4
Spokane, WA	3	3	3	3
Glendive, MT	2	2	1	1
Helena, MT	6	6	6	6

Top Of Mind Issues

Question 2 asked: "What do you consider the single, major problem facing Montana now?"

(See table on following page)

TOP-OF-MIND MONTANA ISSUES

	2006	2005	2003	2001	1999
Economy, Unemployment and Jobs	33%	40%	57%	71%	49%
Politics & Government Issues	12	5	7	4	2
Environmental Issues	10	9	6	3	9
Taxes	9	7	4	4	11
Education	6	15	6	4	5
Healthcare	6	3	4	0	1
Crime and Drugs	4	4	---	1	2
Local Industry	2	1	3	4	7
Uncertain/Other	20%	17%	12%	8%	11%

When it comes to problems facing Montana now, voters remained more concerned about unemployment, jobs and local industry than any other issue group. However, concerns over the economy in the current survey are significantly lower than in previous studies dating back to 1999. In the current survey, 35% listed the economy or unemployment and jobs or local industry as the number one issue. In comparison, 71% made the same response in 2001. In addition to the economy, Montana voters are concerned about politics and government issues, environmental issues, and taxes.

Favorable & Unfavorable Voter Opinions

The survey examined favorable and unfavorable opinion of the Montana Chamber of Commerce, environmental and conservation groups, Montana labor unions, and Montana trial lawyers. The initial question asked: "Do you have a favorable or unfavorable opinion about the Montana Chamber of Commerce? (IF FAVORABLE, ASK...) Would that be very favorable or just favorable? (IF UNFAVORABLE, ASK...) Would that be very unfavorable or just unfavorable?" Identical questions were used to measure opinion of other groups.

(See tables on following pages)

Question 3 asked: "Do you have a favorable or unfavorable opinion about the Montana Chamber of Commerce? (IF FAVORABLE, ASK...) Would that be very favorable or just favorable? (IF UNFAVORABLE, ASK...) Would that be very unfavorable or just unfavorable?"

MONTANA CHAMBER OF COMMERCE	
Very Favorable	8%
Favorable	30
Uncertain	52
Unfavorable	7
Very Unfavorable	4
Total Favorable	38%
Total Unfavorable	11

Question 4 asked: "Do you have a favorable or unfavorable opinion of environmental and conservation groups in Montana? (IF FAVORABLE, ASK...) Would that be very favorable or just favorable? (IF UNFAVORABLE, ASK...) Would that be very unfavorable or just unfavorable?"

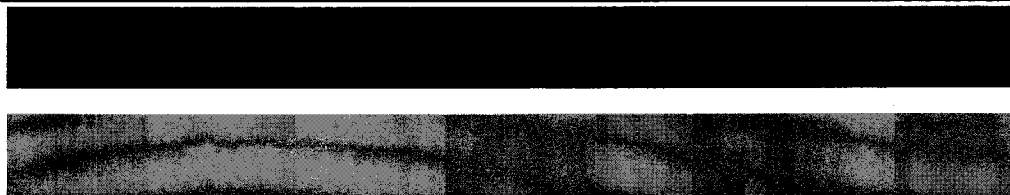
ENVIRONMENTAL AND CONSERVATION GROUPS	
Very Favorable	13%
Favorable	26
Uncertain	20
Unfavorable	23
Very Unfavorable	18
Total Favorable	39%
Total Unfavorable	41

Question 5 asked: "Do you have a favorable or unfavorable opinion of labor unions in Montana? (IF FAVORABLE, ASK...) Would that be very favorable or just favorable? (IF UNFAVORABLE, ASK...) Would that be very unfavorable or just unfavorable?"

MONTANA LABOR UNIONS	
Very Favorable	17%
Favorable	24
Uncertain	27
Unfavorable	20
Very Unfavorable	13
Total Favorable	41%
Total Unfavorable	33

Question 6 asked: "Do you have a favorable or unfavorable opinion about trial lawyers in the state? (IF FAVORABLE, ASK...) Would that be very favorable or just favorable? (IF UNFAVORABLE, ASK...) Would that be very unfavorable or just unfavorable?"

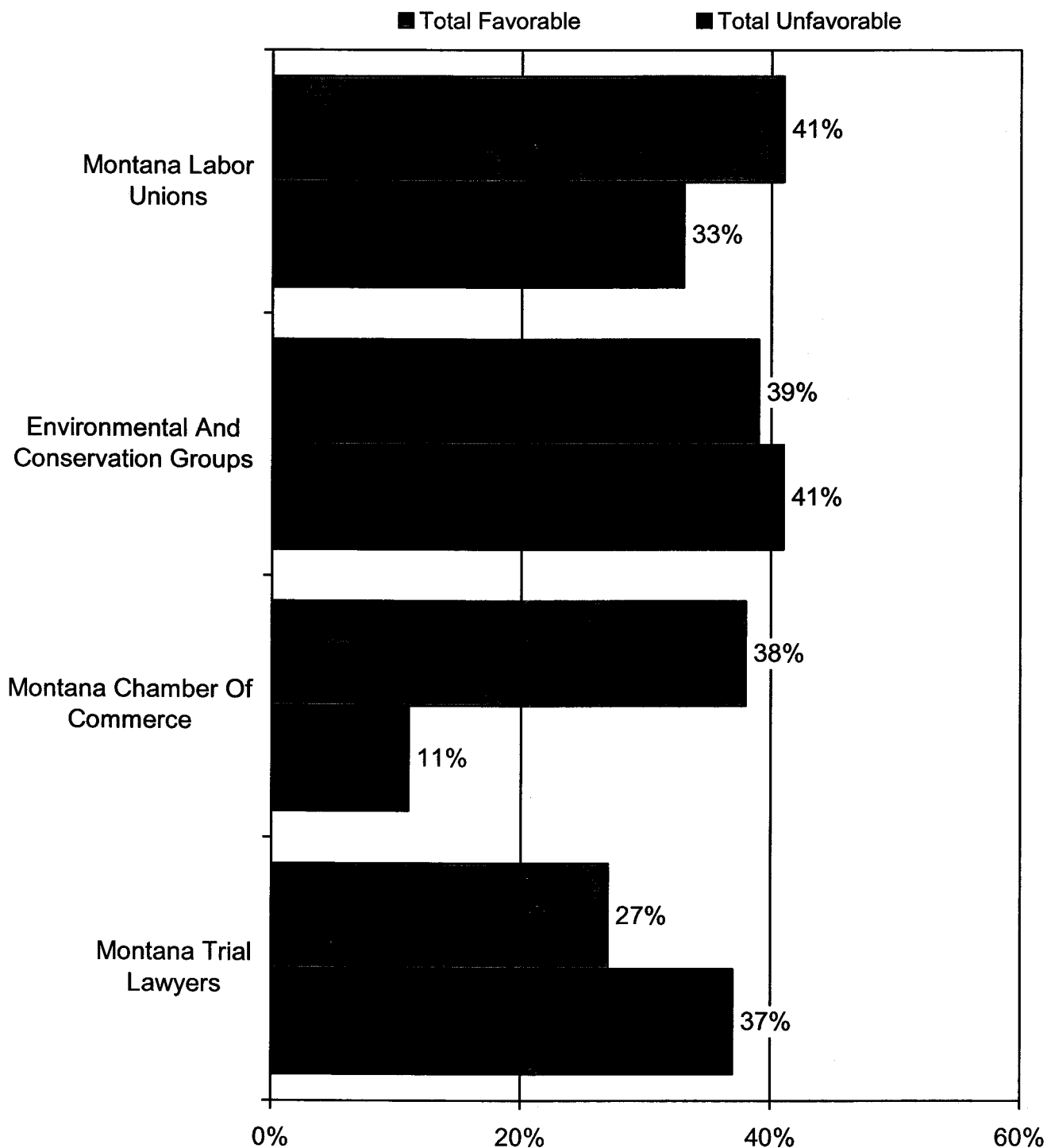
MONTANA TRIAL LAWYERS	
Very Favorable	2%
Favorable	25
Uncertain	37
Unfavorable	18
Very Unfavorable	19
Total Favorable	27%
Total Unfavorable	37



The following graph depicts the total number of respondents saying they have a favorable and unfavorable opinion of each group.

(See graph on following page)

**OPINION OF MONTANA GROUPS
(2006 Survey)**



Although the Montana Chamber has the best favorable to unfavorable ratio, strong favorable opinion exists of unions and environmental groups, but both also have high negatives as well.

Question 7 asked: "When it comes to a growing, vibrant economy with plenty of good paying jobs, would you say that Montana is on the right track and getting better or off on the wrong track and getting worse? (CONTINUE WITH...) Do you feel strongly about that?"

DIRECTION FOR MONTANA ECONOMY				
	2006	2005	2003	2001
Strongly Right Track	22%	15%	10%	15%
Right Track	34	32	18	15
Staying About The Same	14	17	15	17
Wrong Track	9	12	14	13
Strongly Wrong Track	21	24	44	40
Total Right Track	56%	47%	28%	30%
Total Wrong Track	30	36	58	53

Montana voters are far more optimistic about the state's economy today than at any time in recent history. Montana voters responded 56% that the state's economy was moving in the right direction and getting better and only 30% off on the wrong track and getting worse. In comparison, 2003 survey results were 28% right track and 58% wrong track. Although not strongly optimistic about the direction of the state, Montana voters see the state moving in the right direction economically.

Question 8 asked: "Which of the following best describes your top financial or pocketbook concern?"

TOP FINANCIAL CONCERN		
	2006	2005
Healthcare Costs	30%	25%
Higher Energy Costs	14	21
Children's Education	13	7
Taxes	13	10
Secure Retirement	11	16
Paying Off Debt	8	9
Caring for a Child or Elderly Parent	5	3
Job Security	4	4
Uncertain	4%	5%

When it comes to top financial concerns, Montana voters are more concerned about healthcare costs, 30%, than any other area. However, significant concern also exists for higher energy costs, 14%, children's education 13%, taxes 13%, and a secure retirement 11%.

Trust Business in Montana

Two questions examined voter trust for Montana businesses when it comes to protecting the environment and treating workers fairly. The following tables provide results for recent years.

(See tables on following pages)

Question 9 asked: "Thinking about business and industry in Montana, do you think Montana businesses can or cannot be expected to do the right thing when it comes to protecting the environment."

PROTECTING THE ENVIRONMENT					
	2006	2005	2003	2001	1999
Strongly Business Can Be Expected To Do Right Thing	38%	25%	27%	36%	25%
Business Can Be Expected To Do Right Thing	29	26	27	24	29
Uncertain	9	15	16	11	10
Business Cannot Be Expected To Do Right Thing	7	12	12	10	16
Strongly Business Cannot Be Expected To Do Right Thing	17	22	19	19	20
Total Business Can Be Expected To Do Right Thing	67%	51%	54%	60%	54%
Total Business Cannot Be Expected To Do Right Thing	24	34	31	29	36

Question 10 asked: "Thinking about business and industry in Montana, do you think Montana businesses can or cannot be expected to do the right thing when it comes to treating workers fairly when deciding on healthcare coverage, retirement and other work place benefits."

BENEFITS GIVEN FAIRLY TO WORKERS		
	2006	2005
Strongly Feel Business Can Be Expected To Do Right Thing	27%	18%
Business Can Be Expected To Do Right Thing	28	28
Uncertain	14	18
Business Cannot Be Expected To Do Right Thing	10	15
Strongly Feel Business Cannot Be Expected To Do Right Thing	21	21
Total Business Can Be Expected To Do Right Thing	55%	46%
Total Business Cannot Be Expected To Do Right Thing	31	36

Voter trust for businesses in Montana to protect the environment has increased with 67% in the current survey saying they can trust business to do the right thing, up from 51% last year and 54% in 2003. Trust for treating workers fairly for workplace benefits increased from 46% to 55% in the last two annual surveys.

Business & Industry Taxes

Question 11 asked: "When compared to taxes paid by individuals living in Montana, do you believe that the taxes paid by business and industry are: (ROTATE ORDER) Much too high, too high, about right, too low, or much too low?"

TAXES PAID BY BUSINESS & INDUSTRY COMPARATIVELY					
	2006	2005	2003	2001	1999
Much Too High	5%	6%	8%	4%	7%
Too High	23	23	26	22	26
About Right	45	42	40	50	42
Too Low	22	23	18	20	20
Much Too Low	6	7	7	5	5
Total Too High	28%	29%	34%	26%	33%
Total Too Low	28	30	25	25	25

In the current survey, voter opinion is about equal with regard to business taxes being too high or too low. When voters perceive the economy is doing well, they frequently think business and industry can pay higher taxes.

Encouraging Industries In Montana

Question 12 asked: "When it comes to the oil, mining, and timber industries in Montana, do you think State Government should (ROTATE ORDER) encourage and promote these industries because of the jobs and economic benefits provided or restrict and discourage these industries because of potential environmental impact? (CONTINUE WITH...) Do you feel strongly about that?"

PROMOTE OR DISCOURAGE OIL, MINING AND TIMBER INDUSTRIES					
	2006	2005	2003	2001	1999
Strongly Encourage	55%	49%	50%	51%	33%
Encourage	15	20	20	18	24
Undecided	13	11	12	10	13
Discourage	5	8	5	6	12
Strongly Discourage	12	12	13	15	18
Total Encourage	70%	69%	70%	69%	57%
Total Discourage	17	20	18	21	30

Voters continue to hold a strong opinion that State Government should encourage and promote the oil, mining, and timber industries in Montana.

Montana Environmental Protection

Question 13 asked: "I am going to read a statement people have made about environmental issues in Montana. After hearing the statement, tell me if you agree or disagree with it. 'Montana's environment is well protected by existing laws. It is unnecessary for the State Legislature to pass additional environmental regulations at this time.' (CONTINUE WITH...) (IF AGREE, ASK...) Do you strongly agree or just agree? (IF DISAGREE, ASK...) Do you strongly disagree or just disagree?"

MONTANA'S ENVIRONMENT IS CURRENTLY WELL PROTECTED					
	2006	2005	2003	2001	1999
Strongly Agree	36%	30%	24%	29%	19%
Agree	24	25	22	21	26
Uncertain	8	6	9	7	6
Disagree	15	22	20	21	26
Strongly Disagree	18	17	24	21	23
Total Agree	60%	55%	46%	50%	45%
Total Disagree	33	39	44	42	49

Voter opinion that Montana's environment is well protected has increased steadily since 1999 when only 45% of voters agreed compared to 60% in the current study.

State Funding For Public Education

Question 14 asked: "(ROTATE ORDER) Do you agree more with those who say state funding has been adequate to provide a quality education in your local school district, or do you agree more with those who say state funding has not been adequate to provide a quality education in your school district? (CONTINUE WITH...) Do you feel strongly about that?"

STATE FUNDING		
	2006	2005
Strongly Agree Funding Has Been Adequate	28%	22%
Agree Funding Has Been Adequate	19	16
Uncertain	6	8
Agree Funding Has Not Been Adequate	11	14
Strongly Agree Funding Has Not Been Adequate	37	40
Total Agree Funding Has Been Adequate	47%	38%
Total Agree Funding Has Not Been Adequate	48	54

Voters have mixed opinion concerning the adequacy of funding for public education.

Question 15 asked: "Which statement do you agree with more: We should encourage all businesses, both large and small, both resident in Montana as well as non-residents or we should only encourage small businesses and businesses resident in Montana?"

STATEMENT AGREE WITH MOST	
Encourage All Business	70%
Only Encourage Small Business	23
Uncertain	7%

Montana voters strongly want the State to encourage all businesses rather than only encouraging small existing businesses.

Montana State Legislature

Question 16 asked: "As the Montana Legislature convenes in January, what should be the Legislature's number one priority?"

WHAT SHOULD BE THE LEGISLATURE'S FIRST PRIORITY	
Education	18%
Employment, Jobs & Economy	18
Taxes and Budget	16
Healthcare and Other Social Services	13
Environmental Issues	10
Government Issues	7
Uncertain	14%
Other	4

Question 17 asked: "There is a projected state government budget surplus of over 900 million dollars. What should the Legislature first do with most of the surplus?"

WHERE SHOULD LEGISLATURE SPEND SURPLUS	
Property Tax Cuts	30%
Spend It On Education	26
Income Tax Cuts	10
Shore Up State Pension Funds	9
Economic Development Projects	8
Tax Incentives For New Business	5
Rainy Day Fund	4
Refund to Tax Payers	3
Other	3%
Uncertain	3

Most voters want property and income tax cuts, 40%, with 26% saying spent it on education.

Question 18 asked: "Do you favor (ROTATE ORDER) higher taxes and more government services or lower taxes and fewer government services? (CONTINUE WITH...) Do you feel strongly about that?"

TAXES AND GOVERNMENT SERVICES	
Strongly Lower Taxes & Fewer Government Services	54%
Lower Taxes & Fewer Government Services	16
Uncertain	14
Higher Taxes & More Government Services	7
Strongly Higher Taxes & More Government Services	9
Total Lower Taxes & Fewer Government Services	70%
Total Higher Taxes & More Government Services	16

Question 19 asked: "If the Legislature passes revisions to the property tax, should it pass a one-time, across the board \$400 rebate or should it pass permanent property tax reductions? (CONTINUE WITH...) Do you feel strongly about that?"

REVISION TO PROPERTY TAX	
Strongly Pass Permanent Property Tax Reductions	62%
Pass Permanent Property Tax Reductions	13
Uncertain	9
Pass One-Time, Across The Board Rebate	6
Strongly Pass One-Time, Across The Board Rebate	11
Total Pass Permanent Property Tax Reductions	75%
Total Pass One-Time, Across The Board Rebate	17

Question 20 asked: "Would you support a state sales tax if it eliminated either the state property tax or state income tax?"

STATE SALES TAX	
Yes	52%
No	43
Uncertain	6%

Highest priorities for the State Legislature include the economy with employment and jobs, education, taxes and the state budget, healthcare and other social services, and environmental issues. Voters most want the Legislature to use the 900 million dollar surplus to cut property and income taxes and spend it on education. As indicated above, cutting income taxes, shoring up state pension funds, and use for economic development projects and tax incentives for new businesses were also very important. Voters felt very strongly, 79%, that when it comes to spending the surplus, the money should be used more on an on-going spending allocation over the years than for one time items. Voters also strongly favor, 70%, lower taxes and fewer government services as opposed to higher taxes and more government services. With a 75% response, voters say that a property tax reduction should be permanent rather than one time. The majority of voters favored a sales tax for Montana if it eliminated either the state property tax or state income tax.

Montana's Civil Justice System

Question 21 asked: "Now, I would like you to think about the civil justice system in Montana. (ROTATE ORDER) Some/Other people say that the present system in Montana is working well and should not be changed. Some/Other people say that the system in Montana has problems and should be improved. What do you think? Should the civil justice legal system be improved or is it working well just the way it is? (CONTINUE WITH...) Do you feel strongly about that?"

(See table on following page)

CIVIL JUSTICE SYSTEM IN MONTANA		
	2006	2005
Strongly Working The Way It Is	20%	13%
Working The Way It Is	21	22
Uncertain	17	17
Needs Improvement	11	18
Strongly Needs Improvement	31	30
Total Working The Way It Is	41%	35%
Total Needs Improvement	42	48

Voters have mixed reaction concerning Montana's Civil Justice System with almost equal numbers saying that the system needs improvement and that it's working well the way it is.

Question 22 asked: "When it comes to the Montana legal system, would you say judges generally follow existing laws or that judges are too activists making new laws from the Bench? (CONTINUE WITH...) Do you feel strongly about that?"

MONTANA LEGAL SYSTEM	
Strongly Generally Follow The Law	33%
Generally Follow The Law	23
Uncertain	18
Judges Are Activists	5
Strongly Judges Are Activists	21
Total Generally Follow The Law	56%
Total Judges Are Activists	26

Montana voters believe that most judges follow the law and are not activists making new laws from the bench. However, about one in four voters see judges acting more like activists.

Question 23 asked: "In a lawsuit involving an auto accident, do you think juries should or should not be able to consider whether a person was wearing a seatbelt?"

SEATBELT RELEVANT IN AUTO LAWSUIT	
Should	66%
Should Not	27
Uncertain	7%

Montana voters believe that judges generally follow existing laws rather than legislate from the bench. Voters also believe that in lawsuits involving auto accidents, jurors should consider whether a person was wearing a seatbelt or not.

DEMOGRAPHICS

Question 24 asked: "Do you think of yourself as a Republican, a Democrat, or an Independent? (IF INDEPENDENT, ASK...) Do you lean more toward thinking of yourself as a Republican or a Democrat?"

POLITICAL PARTY IDENTIFICATION					
	2006	2005	2003	2001	1999
Republican	35%	35%	32%	34%	30%
Independent Republican	14	14	14	16	13
Independent	13	11	18	13	16
Independent Democrat	11	13	12	11	12
Democrat	27	26	24	27	30
Total Republican	49%	49%	46%	50%	43%
Total Democrat	38	39	36	38	42

Question 25 asked: "What is your age?"

AGE				
	2006	2005	2003	2001
18-29 Years	6%	5%	10%	13%
30-44 Years	17	21	23	25
45-59 Years	38	36	35	33
60 Years & Over	40	38	32	30

Question 26 asked: "What is the highest level of education you have obtained to date?"

LEVEL OF EDUCATION				
	2006	2005	2003	2001
Less Than High School	4%	3%	3%	3%
High School Graduate	26	27	25	28
Some College or 2 year Degree	30	30	31	34
College Graduate	25	24	27	24
Post Graduate	16	15	14	11

Question 27 asked: "Which of the following categories includes your household's annual income? Just stop me when I read the right category."

ANNUAL HOUSEHOLD INCOME	
	2006
Less Than \$20,000	12%
Between \$20,000 to \$40,000	30
Between \$40,000 to \$60,000	24
Between \$60,000 and \$100,000	20
Over \$100,000	14

ANNUAL HOUSEHOLD INCOME	
	2005
Under \$20,000	12%
\$20,000 to \$39,999	26
\$40,000 to \$59,999	26
\$60,000 & Over	35

ANNUAL HOUSEHOLD INCOME	
	2003
Under \$20,000	16%
\$20,000 to \$39,999	29
\$40,000 to \$59,999	26
\$60,000 to \$79,999	14
\$80,000 & Over	14

Question 28 asked: "And, your gender is male or female? (CONTINUE WITH...) Are you employed outside the home?"

GENDER & EMPLOYMENT STATUS				
	2006	2005	2003	2001
Employed Male	31%	33%	35%	35%
Not Employed Male	20	16	16	16
Employed Female	25	25	26	28
Not Employed Female	25	26	23	21

Montana voters continue to identify themselves more as Republicans than Democrats. In the current survey, 49% identified themselves more as Republicans, 38% more as Democrats, and 13% said they were Independent not leaning toward one party more than the other. Montana has been more Republican than Democrat in all Market Research Insight surveys since 2001. Similar to other states, active voters in Montana are somewhat older than the total population 18 years and older. The aging of Montana voters can be seen steadily in all surveys from 2001 through the current sampling. Currently, 40% of active voters are 60 years or over in Montana. Montana's educational level has also increased in recent years going from 35% college graduates in 2001 to 41% college graduates currently. In 2003, 28% of Montana voters lived in households earning \$60,000 or over annually. Today, 34% of households have \$60,000 plus incomes.